

### Purpose

This SOP is intended to outline the proper steps for handling an escalated issue for claim part options, authorized dollar amount, claim delays, etc.

### Teams Impacted

- General Claims
- Powertrain Claims

### Procedure

1. If a customer or repair facility calls in due to disagreement with the claim decision or amounts authorized.
  - a. Actively listen and acknowledge their concern/s.
  - b. Advise the caller to give you a moment to review notes.
    - i. Review all notes in the claim to fully understand what is going on.
2. Empathize with the caller and understand their frustration. Attempt to de-escalate the situation and come to a resolution.
  - a. If speaking with the repair facility
    - i. See what you can do to negotiate the best part price to help the customer.
    - ii. Double-check the labor time to make sure we are meeting our labor guide times.
  - b. If speaking with customer
    - i. Explain contract terms of coverage for how we determine coverage eligibility.
    - ii. Go over the labor difference of the shop's time to our verified times and dollar amount difference. Double-check IDFX if needed.
    - iii. Advise of part sourcing options, dollar amount difference, and why.
  - c. If you de-escalated the call skip to step 7.D below.
3. When you are getting a call where the claim has been delayed.
  - a. Review the claim to see the last time the assigned adjuster has made movement.
  - b. If any documents or records have been requested, verify they have been posted to the claim for review.
    - i. If the documents or records are posted, process the information while on a live call.
    - ii. If not posted, give the caller your work email to send the information, and post it to the claim.
    - iii. Process the information just sent while you have the caller on the phone.
    - iv. If you can finalize the claim with the information provided move the claim forward.
  - c. If you have made movement for a Powertrain claim and the caller is no longer looking for a lead/supervisor. Please send the information to your team lead.
    - i. The team lead will send an email to the assigned adjuster's team lead and CC their supervisor.
  - d. If you de-escalated the call skip to step 7.D below.

4. If the caller is continuing to ask to speak with a lead/supervisor, ask the caller to please hold.
  - a. Document the claim for what has been addressed and caller's concern.
  - b. Message your team lead on TEAMS for live assistance to de-escalate the call.
  - c. Do not transfer to the lead just yet, use the tips/information the lead provides to continue to de-escalate the call and resolve the matter.
  - d. If you de-escalated the call skip to step 7.D below.

Escalation

Caller (ch/rf) is upset about (auth totals, part options, out of pocket cost, or delay of the claim)

After going over the labor times verified and the parts sourced caller (ch/rf) still unhappy

Will reach out to my lead for more help with the caller.

Johnnie Martinez

5. Once you have exhausted all your options and the caller still wants to speak to a lead/supervisor. Make sure to:
  - a. Note the claim of all the options you offered to resolve the matter.
  - b. Note the caller's name and good call-back number.
  - c. Advise the caller you will send this claim to your lead/supervisor.
    - i. Also advise your lead/supervisor will review the claim and give them a callback within 2 hours.

Escalation

After speaking with my lead I was able to offer the caller (ch/rf)

The rf part for .....

Still unable to assist with labor difference as it's at IDFX max

Ch oop cost is....

Caller still unhappy with the option/s I was able to assist with

Advise Mike Jones that I will have send this claim to my lead

for further review and my lead will call back with in 2hrs.


Call back # 281-330-8004

Johnnie Martinez

6. Task your lead/supervisor for a follow-up call back on an escalation issue. Fill in the following before clicking **[Save]**.
  - a. Subject: type Escalation.
  - b. Task type: what type of claim (General/ Powertrain).
  - c. Assigned to Lead/supervisor.
  - d. Task reason.
  - e. Date is always the same day as the escalation.
  - f. Note anything that is important outside of the note within the claim.
  - g. Priority set to High.

Task Information

Name

 Search Contacts...


\*Subject

Escalation

\*Task Type

Power Train

Assigned To

 Johnnie Martinez

\*Task Reason

Follow Up

1 Total Task


Due Date

3/6/2023

Other Reason Details

Customer is extremely upset, unwilling to hear information for a floor adjuster will like to speak to a lead/sup

Related To

 2136570

Activity Capture Type

--None--

Additional Information

\*Priority

High

Save & New

Cancel

Save

7. Team lead will review the claim notes and make a call out within 2 hours of receiving the task.
  - a. Come up with a pre-solution before calling and getting more information from the caller (contract holder/repair facility).
  - b. Reach out to the caller, actively listen, and acknowledge their concern/s.
  - c. Do what you can based off the situation with the caller's experience in mind, without giving away everything.
  - d. Note the claim as Escalation Resolution
    - i. Add the outcome of the call.
    - ii. Who the information was given too.
    - iii. If not the customer, a call must be made.

Escalation	After reaching reviewing claim and reaching out to Mike Jones We were able to agree on Labor time for diag after updating 3c's with test results Call ch to go over out of pocket cost for parts as rf does not allowed part shipped Ch is okay with out of pocket cost	Johnnie Martinez
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## SOP: Handling Escalations

### Approval & Revision

Date Created 8/3/2023	Created By Johnnie Martinez		Date Approved 9/13/2023	Approved By Jason Dolan	
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